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# **From the account manager's conscience to top-of-mind: Account Planning in Australia.**

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## **Abstract**

What began as the “account manager’s conscience” has grown to be top-of-mind in Australian advertising today. Account planning is a hybrid discipline which uses research to bring the consumer voice to the campaign process during strategy generation, creative development and evaluation. In Australia, account planning is subjected to the “Vegemite Factor” where planners are spread too thinly across accounts and much of the market is dominated by freelance researchers and planners. This unique environment has shaped many different perceptions of account planning in Australia. These are compared with an international definition of account planning and the current research. While many basic tenants of the definition are shared by Australian advertising professionals, the difference appears to be in the ongoing nature, team approach and level of commitment. In Australia, account planners seem to be more facilitators of the strategic direction, than directors of it. Instead of exerting a sustained influence across the campaign, most energy appears to be expended at the start of campaign development, rather than extending through to its evaluation.

## **Introduction and Purpose**

What began as the “account manager’s conscience” has grown to be top-of-mind in Australian advertising today. Account planning is a hybrid discipline which uses research to bring the consumer voice to the campaign process during strategy generation, creative development and evaluation. In doing so, it bridges the gap between account management and creative, consumer and client.

The American Association of Advertising Agencies describe an account planner as “the account team’s primary contact with the outside world; the person who, through personal background, knowledge of all pertinent information, and overall experience, is able to bring a strong consumer focus to all advertising decisions.”

More recently, Crosier and Pickton (2003, p.414) suggest that, “Account planning is the marketing services agency discipline that:

- Researches and defines the client’s offering and marketplace;
- Applies strategic thinking, grounded in intelligence and insights to campaign planning;
- Briefs account-handling, creative and media specialists;
- Collaborates with them in a team, to produce pre-tested creatively distinct and accurately targeted marketing communications campaigns, integrated across all media;
- Assesses, quantitatively and qualitatively, the effectiveness of the outcome.”

Most research to date has focused on the UK and US, looking at who account planners are, what kind of skills they possess and what tasks they undertake in the agency environment (Steel 1998, Morrison and Haley 2000, Crosier and Pickton 2003). The goal of this paper is to compare this body of research with the perceptions of advertising industry practitioners in Australia. In doing so, it determines whether Australians define account planning in the same way as their global counterparts, whether they operate similarly in the agency environment and how much influence they exert on the campaign process.

This research is important for many reasons. Firstly, it is important to compare the state of the literature with industry practice to see if there is consensus or confusion. Secondly, as an emerging new discipline, it is important that account planners define themselves internationally as a body of professionals. And thirdly, little research has been undertaken on account planning outside of the UK or US. There are only two notable exceptions - one Scottish study and another in Australia (Crosier et al 2003, Butcher and McCullough 2003). This study introduces quantitative data to augment earlier Australian insights.

### **History of Account Planning**

Account Planning began as a discipline in the UK when Stanley Pollitt lamented the separation of advertising from its ultimate impact on consumers. To act as “the account man’s conscience”, he re-engineered research to embrace insight and introduced the concept of account planning to the small British firm of Pritchard Wood and Partners in the mid 1960’s.

However the practice of account planning in Australia can be traced to the 1950s, when ex-military British intelligence officer, David Brent applied his research and analysis skills to the Australian advertising industry. Unsure of its value, the local industry did not embrace account planning until they could see its success overseas. In the 1980s, Reg Bryson, CEO of the Campaign Palace, introduced account planning into his agency and it became the benchmark for the Australian advertising industry.

At the same time, US Advertising Chief, Jay Chiat also noticed the innovative and effective campaigns that account planners developed in the UK and introduced account planning to Chiat Day in 1981. A recent study by Morrison and Haley (2003) showed the average account planner in the US works on fewer than five accounts, with 70% of his or her time devoted to a primary account. Their major areas of involvement include brand strategy, creative strategy development, research design in advance of creative brief, writing creative briefs, presenting creative briefs to creative department, presenting creative briefs to account team and primary data analysis in advance of creative brief. Only 45% had received formal training in account planning.

In Australia, account planning is smeared with “The Vegemite factor”, with planners spread too thinly across a wide range of accounts. In Australia’s two largest advertising cities, Sydney and Melbourne, it is suggested that there are about 30 account planners. The same number that might work in just one London agency (Butcher and McCullough 2003). Account planning is offered as an elective at at least one Australian university and the Advertising Federation of Australia’s (AFA) education arm, AdSchool also offers a subject in account planning.

Another unique aspect of the Australian market is the strong presence of researchers and freelance planners. This is a product of a smaller marketplace, peopled by smaller advertising agencies and tighter margins. Also it is thought that clients consider researchers more objective and trustworthy than agency people (Butcher and McCullough 2003). The adoption of account planning in Australia has been hampered by the lack of commitment of top management, resistance by account management, talented and open-minded creatives, client perceptions of planning credibility and environmental conditions.

### Methodology and Findings

An opinion scale for assessing account planning perspectives internationally (Kerr, Rose and Segev 2005) was used in this survey. The database was compiled from the Australian Industry Press, AdNews Handbook and the Queensland University of Technology, School of Advertising Marketing and Public Relations database. Names and positions were confirmed by phoning the agency and an email list was established. Senior decision makers in the area of advertising management, media, creative and account planning were targeted. A mailout of 120 names, followed by a reminder email with survey attached, yielded 43 responses, a response rate of 36%.

Almost three quarters of all Australian respondents (74.4%) believe that their agency is using account planning. Almost half (46.5%) believe that their agency has used account planning for more than five years. They define account planning, as strategy development (34.9%), developing consumer insight (16.3%), the link between account service and creative (9.3%) and something used on an ad hoc basis (9.3%). The beliefs about account planning held by advertising agency professionals in Australia today are summarized in Table 1.

**Table 1: Beliefs about Account Planning in the Australian Advertising Industry**

	1	2	3	3	2	1	
Leads strategy	48.8%	30.2%	11.6%	2.3%	7.0%	4.6%	Justifies strategy
Understands consumers	30.2%	11.6%	18.6%	23.3%	7.0%	16.3%	Strategic options
Connects with target	16.3%	16.3%	23.3%	20.9%	9.3%	20.9%	Inspires creatives
Makes ideas happen	23.3%	20.9%	23.3%	9.3%	16.3%	9.3%	Source of ideas
Plan research	9.3%	18.6%	18.6%	25.6%	11.6%	11.6%	Analyze research
Influences clients	11.6%	13.9%	32.6%	20.9%	20.9%	4.6%	Influence agency
Decision maker	9.3%	14.0%	14.0%	32.6%	25.6%	4.6%	Informs decision-makers
Works with acct service	7.0%	11.6%	44.2%	30.2%	11.6%	7.0%	Works with creative
Develops research	23.2%	18.6%	34.9%	16.3%	4.6%	4.6%	Develops creative

plan							
Sells creative strategy	7.0%	11.6%	25.6%	36.9%	7.0%	13.9%	Develops creative strategy

Most advertising professionals see the account planner's role as strategic and facilitative. Almost half of the respondents (48.8%) feel strongly that it is the role of account planners to lead the strategy, rather than justify strategy (4.6%). Most believe that the account planner facilitates the creation of ideas (23.9%), rather than being the source of these ideas (9.3%). They are believed to both connect with the target market (16.3%) and to inspire creatives (20.9%). There is strong focus on understanding consumers (30.2%), rather than identifying strategic options (16.3%) for the organization.

They do not strongly influence either the client or the account management or creative teams. Nor are they perceived strongly as either key decision makers (9.3%) nor primary informers of the key decision makers (4.6%). Their role appears to be more facilitative. Their primary role is not seen as either selling the creative strategy (7.0%), nor developing it (13.9%). Nor are they seen as either working exclusively with the account management team (7.0%) or the creative (7.0%). The development of the research plan is seen as a primary area of responsibility (23.2%), planning, supervising and analysing the research.

### **Discussion and Conclusions: How does the Australian perception compare with the internationally accepted definition and practice?**

Advertising professionals in Australia define account planning as developing advertising strategy, based on consumer insight. The key characteristics of Australian account planners identified by this research are:

1. Account planners develop the research plan, supervise and analyse the research.
2. This understanding of the research allows them to gain insights into consumers and connect with the target market.
3. Their role is to lead the development of advertising strategy.
4. They facilitate and incite the creation of ideas, but are not the source of those ideas.
5. They neither primarily influence client or agency. Nor or they the key decision makers or influencers of the key decision makers.

Table 2 compares the findings of this study with the definition of account planning presented in the literature review.

**Table 2: Comparison of Australian perceptions with international definition of Account Planning**

<b>Definition of Account Planning (Crosier and Pickton 2003)</b>	<b>Findings of this study: Australian Perceptions</b>
Researches and defines the client's offerings in the marketplace	Account planners develop the research plan, supervise and analyse the research.
Applies strategic thinking, grounded in	This understanding of the research allows

intelligence and insights to campaign planning	them to gain insights into consumers and connect with the target market. Their role is to lead the development of advertising strategy.
Briefs account-handling, creative and media specialists	
Collaborates with them in a team to produce pre-tested creatively distinct and accurately targeted marketing communications campaigns integrated across all media	They facilitate and incite the creation of ideas, but are not the source of those ideas. They neither primarily influence client or agency. Nor or they the key decision makers or influencers of the key decision makers.
Assesses, quantitatively and qualitatively the effectiveness of the outcome	

The basic tenants of the international definition of account planning appear to be popular belief in Australia. The only two missing components are briefing and evaluation. It could be that these two roles are handled by account service in Australia. Or simply that they were more process issues, rather than definitional issues that this research has sought. Certainly, there is evidence to suggest that account planners are more involved in the early stages of campaign development, such as research and strategy development, rather than the more advances stages of evaluation. There is also less evidence of a team process. Perhaps this is an artifact of the large number of freelance researchers and planners in the Australian marketplace.

In practice, account planners in Australia appear to adopt a more facilitative role, using research to understand the consumer and provide the strategic direction to make the campaign work. There is evidence that the role of account planners is more directive in the US, where the priority is to influence the agency and inform key decision makers (Kerr, Rose and Segev 2005).

The application of the scale developed by Kerr, Rose and Segev 2005, and used in this research, to other nations, including those in the Asia-Pacific region, would provide a more global perspective of the discipline. Greater understanding of the perceptions and practices of account planners may improve best practice, encourage innovation internationally and help the new discipline of account planning to define itself.

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